

OFFICE OF THE SECRETARY OF DEFENSE

1950 DEFENSE PENTAGON WASHINGTON, DC 20301-1950

April 15, 1985

ADMINISTRATIVE INSTRUCTION NO. 55

SUBJECT: Requests for Civilian Position and Personnel Actions

References: (a) Administrative Instruction No. 55, "Request for Civilian Position and Personnel Actions," August 9, 1965, as amended (hereby canceled)

- (b) Federal Personnel Manual Supplement 296-33
- (c) <u>DoD Directive 5500.7</u>, "Standards of Conduct," January 15, 1977
- (d) Public Law 3104
- (e) DoD 5200.2-R, "DoD Personnel Security Program," December 20, 1979
- (f) Section 5406 of title 5. United States Code

1. REISSUANCE AND PURPOSE

This Instruction reissues reference (a) to update and implement procedures and guidelines for initiating or requesting civilian position and personnel actions in accordance with reference (b) and assigns responsibilities for obtaining civilian position and personnel actions.

2. APPLICABILITY

This Instruction applies to the Office of the Secretary of Defense (OSD), the Inspector General, Department of Defense and other organizations administratively supported by the Directorate for Personnel and Security, Washington Headquarters Services. These organizations are referred to as the "Requesting Activity."

3. RESPONSIBILITIES

3.1. The Requesting Activity shall:

- 3.1.1. Prepare and submit a Standard Form 52, "Request for Personnel Action," for each civilian position or personnel action, in accordance with this Instruction.
- 3.1.2. Prepare position descriptions when required, and submit them with the Standard Forms 52.
 - 3.1.3. Provide supporting documentation, as required.
- 3.1.4. Determine if a DD Form 1555, "Confidential Statement of Affiliations and Financial Interest," is required in accordance with DoDD 5500.7 (reference (c)), and annotate the position description accordingly.
- 3.1.5. Determine position sensitivity (critical-sensitive, noncritical-sensitive, or nonsensitive) and annotate position descriptions and Standard Forms 52 accordingly.
- 3.1.6. Ensure that employees complete Standard Forms 52 appropriately when they are resigning, transferring or retiring (see enclosure 1) and check out on their last day of duty using SD Form 225 (enclosure 4).
- 3.1.7. Inform employees of the final action taken, including the delivery of written documentation.
- 3.2. The <u>Deputy Assistant Secretary of Defense (Administration)</u> (DASD(A)) shall:
- 3.2.1. Obtain necessary coordination or approvals or both from the Secretary of Defense, Deputy Secretary of Defense, or Assistant to the Secretary and Deputy Secretary of Defense; members of committees of the Executive Resources Board; Office of Personnel Management (OPM); and other officials or Agencies when required, for actions concerning Executive Level, Senior Executive Service (SES), supergrade, Public Law 3104 (reference (d)), and similar senior executive or appointive positions.
- 3.2.2. Ensure that necessary civilian ceiling spaces, SES resources, noncareer appointment authorities, Limited Term Authorities, and Limited Emergency Authorities are authorized, available, and appropriately utilized.
 - 3.2.3. Approve interim security clearances.

- 3.3. The <u>Director</u>, <u>Personnel and Security</u>, <u>Washington Headquarters Services</u>, shall:
- 3.3.1. Process position and personnel actions in accordance with reference (b).
- 3.3.2. Ensure that necessary civilian ceiling spaces or funding or both are authorized and available to Requesting Activity.
- 3.3.3. Validate position information against the "Position and Strength Report" to verify position authorization, organizational alignment, and position title.
- 3.3.4. Ensure that the individual selected for the position meets the investigative criteria for occupying the position. The investigative criteria are based on the level of the position sensitivity (enclosure 1, Part II, Item Number 3 and enclosure 3, subsection E3.2.6.). When access to classified information is the basis for the level of position sensitivity, issuance of security clearance will be required before entry on duty in OSD.
 - 3.3.5. Notify the Requesting Activity of final action taken.

4. PROCEDURES

- 4.1. Requests for individual position actions, individual personnel actions, or combined position and personnel actions shall be made by the Requesting Activity on Standard Form 52 in accordance with the procedures and instructions contained in enclosures 1 through 3 of this Instruction.
- 4.2. When processing reorganizational changes, the following documentation shall be required:
 - 4.2.1. Organizational chart of the old organization.
 - 4.2.2. Organizational chart of the new organization.
- 4.2.3. Approved statements of functions for the new or altered organizational units.
- 4.2.4. An Optional Form 8, reflecting the new organizational location for each position.

- 4.2.5. If there is a change in duties, a draft position description.
- 4.2.6. A Standard Form 52 completed in the following manner.
- 4.2.6.1. When there are no position changes such as a change in title, duties, or position description number, type "See attached list" in Part II, Item Number 1, and complete Item Number 21 on FROM side and Item Number 28 on TO side for each organizational unit affected. Attach a list of employees with their current title, series, grade, and salary.
- 4.2.6.2. When there are changes to an employee's position involving duties, sensitivity, or filing requirements of a financial interest statement, a separate Standard Form 52 shall be submitted for each employee.
- 4.3. For other personnel actions that do not change an employee's title, series or grade, such as realignments and change in organizational title, a single Standard Form 52 shall be submitted showing the changes in the FROM and TO sides and a list of employees indicating their current title, series, grade, and salary shall be attached to the Standard Form 52.
- 4.4. The original Standard Form 52 shall be submitted by the Requesting Activity to the Directorate for Personnel and Security, Washington Headquarters Services Personnel Data Office, Room 3A346, The Pentagon, Washington, DC 20301. The Requesting Activity shall retain a file copy.
- 4.5. The Directorate for Personnel and Security shall notify the Requesting Activity when final action has been taken on each position or personnel action request, using a Standard Form 50B, "Notification of Personnel Action." The "Employee Copy" of the Standard Form 50B will be submitted to the Requesting Activity for delivery to the employee concerned.
- 4.6. Requests for position or personnel actions that cannot be processed shall be returned to the Requesting Activity with a statement of reasons for such action.
- 4.7. Advice and assistance required in the preparation of a Standard Form 52 or in connection with specific matters concerning the action being requested shall be directed to the personnel staffing specialist or position classification specialist assigned to service the Requesting Activity.

5. EFFECTIVE DATE

This Instruction is effective immediately.

D. O. Cooke Deputy Assistant Secretary of Defense

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Enclosures - 4

- E1. Instructions for Completing Standard Form 52, "Request for Personnel Action"
- E2. Sample of Standard Form 52, "Request for Personnel Action"
- E3. Glossary of Terms For Use in Preparing a Request for Personnel Action
- E4. SD Form 225, "Office of the Secretary of Defense Personnel Checkout Sheet"

E1. ENCLOSURE 1

INSTRUCTIONS FOR COMPLETING STANDARD FORM 52, "REQUEST FOR PERSONNEL ACTION"

E1.1. SPECIFIC INSTRUCTIONS

Apply the following instructions when preparing a Standard Form 52 in requesting civilian position and personnel actions:

PART I

Item

	<u>item</u>	
A.	For Agency Use	Fill in appropriate Requesting Activity Control Number such as HA-20-85.
B.	For Additional Information Call	Type the name and extension of the administrative officer or other personnel liaison contact.
C.	Personnel Action Requested	Refer to enclosure 3 for terminology to be used.
D.	Proposed Effective Date	Indicate the date the Requesting Activity desires the action to be effective. If a specific date does not apply, use ASAP (as soon as possible). Use two digits for the month, day, year such as 06-01-85.
E.	Requested by	Fill in the name of the supervisor of the position. Leave blank if requesting official is also approving official.
F.	Position Action Requested	Refer to enclosure 3 for terminology to be used.
G.	Proposed Effective Date	Same as Item D.
H.	Approved by	To be signed by the person in the Requesting Activity who has been authorized to approve personnel actions by the head of the activity.
I.	Remarks by Requesting Office	Make appropriate or clarifying remarks regarding the position or personnel action. NOTE: If action requested is employee resignation and if the Requesting Activity knows of additional or conflicting reasons for the resignation, state these on a separate sheet and attach to the Standard Form 52. Enter special conditions of employment, including requirement for access to Top Secret, Secret, or Confidential information. If access to sensitive compartmented information is also required, so state. State limitation on length of employment. Specify special physical or other qualifications requirements. State effective date that leave without pay begins and expected date of employee's return. State reason for extension of a detail in excess of 120 days. For name change, state reason for the change, such as marriage, divorce, or court action.

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Give reasons for canceling an occupied position. For change of duty station, show former duty station (building, city and State). For recruit actions, name the last incumbent.

PART II

<u>Item</u>

1.	Name	Leave blank for recruit actions or other actions that are not applicable to a particular employee. When action is being requested in the name of an employee, show his or her name exactly as it appears on official records. Enter it in capital letters, listing last name, first name, and middle initial. Enter "NMN" if employee has no middle name. In reporting a change of name, show present name under this item; show former name under Part I, Item I.
2.	SSN (Social Security Number)	Complete for actions where a name has been entered in Item 1.
3.	Position Sensitivity	Indicate whether the position is critical-sensitive, noncritical-sensitive, or nonsensitive. NOTE: Follow the criteria outlined in paragraph 3-101, DoD 5200.2-R (reference (e)) for designation of position sensitivity.
4.	Date of Birth	Enter on all actions where a name has been entered in Item 1 using two digits for month, day, year such as 03-01-40.
5-15		Leave Blank
16.	Work Schedule	Use the following: F for full time, P for part time, or I for intermittent
17-19		Leave Blank
20-33		Fill in FROM for separations and placement of employees in nonpay status and to extend or terminate details. Fill in TO for appointments, restorations, extensions, name changes, and returns from nonpay status. Fill in FROM and TO if information is available and the personnel action is a change of an employee's position title, position number, series, grade, salary, organizational designation, or geographic location.
34.	Duty Station	Enter building, city and State such as Pentagon, Arlington, VA
35.	Position Occupied	Indicate 1-Competitive, 2-Excepted, 3-SES General, 4-SES Career Reserved
36.	Appropriation Code	The Appropriation Code includes the timekeeper code and the RCCC (Responsibility Cost Control Code). THIS ITEM MUST BE COMPLETED.
37-39		Leave blank.

PART III

To be completed by the Personnel Office

PART IV

Employee Resignation, Retirement or Transfer

This part will also be used for retirement. Employee will complete this part when he or she informs the immediate supervisor of intent to resign or retire. A specific reason must be given. For retirement, show reason and change the statement to read: "I am retiring because ______." THE IMMEDIATE SUPERVISOR WILL ENSURE COMPLETION OF ITEMS A THROUGH E WHEN THE EMPLOYEE INFORMS THE SUPERVISOR OF HIS OR HER INTENT TO RESIGN. In cases where an employee is transferring to another Activity or Agency, this part shall also be completed. Change the statement to read: "I am transferring to _____."

(Activity or Agency)

E1.2. GENERAL INSTRUCTIONS

- E1.2.1. In addition to the specific instructions set forth above, apply the following general instructions in preparing a Standard Form 52.
- E1.2.1.1. <u>Identical Positions</u>. Submit one Standard Form 52 to establish one or more identical positions, provided the positions will be in the same organizational element. Submit a separate Standard Form 52, to establish and recruit for more than one identical position.
- E1.2.1.2. <u>Personnel Action Requests</u>. Submit a separate Standard Form 52 for each personnel action requested.
- E1.2.1.3. <u>Request for Combined Personnel and Position Action</u>. Submit one Standard Form 52 to request a combined personnel and position action for each position.
- E1.2.1.4. Request for Leave Without Pay. When an employee is scheduled to be absent for a period of more than 30 consecutive days or more than 80 hours for on-the-job injury or illness, submit a Standard Form 52 as soon as it is known that the employee has or will exceed the time period. In Part I, Item Number I, indicate the date the absence without pay began and the expected date of return. On the employee's return to duty, submit a Standard Form 52 to indicate the effective date.
- E1.2.1.5. <u>Record Purpose Actions</u>. A Record Purpose Action is the result of a reassignment within a branch to a position with the same job title, compensation schedule, grade, salary and series. Submit a Standard Form 52 for such actions.
- E1.2.1.6. <u>Detail</u>. A Standard Form 52 shall be submitted for each detail in excess of 30 days. The Standard Form 52 will show the beginning and ending dates of

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- the detail. When a detail that was originally scheduled for 30 days or less extends beyond 30 days, the effective date will be the date the detail originally began.
- E1.2.1.7. <u>Change in Appropriation</u>. Submit a Standard Form 52 as a notice of the change in position from one appropriation code to another. A transfer of appropriation codes results in a change in organization code.
- E1.2.1.8. Change in Position Sensitivity. Submit a Standard Form 52 when the designated position sensitivity is to be raised or lowered. Lowering of position sensitivity will result in a lower level of security clearance. Raising of the sensitivity level will result in adjudication to determine the individual's eligibility for a higher level of clearance and may necessitate additional investigation. Elevating position sensitivity from a lower level to a higher level of sensitivity within 90 days after a selectee has entered on duty will require written justification for the change. The written justification must be signed by the Head of the Requesting Activity and accompany the revised Standard Form 52.
- E1.2.2. Attach to the Standard Form 52 the forms and statements described below, as required for the actions requested:
- E1.2.2.1. <u>Change to Lower Grade</u>. A signed request by the employee for a change to a lower grade when the action is effected at the employee's request.
- E1.2.2.2. <u>Change in Work Schedule</u>. If the change is requested by the employee, a copy of the request for the change.

E1.2.2.3. Separation Actions:

- E1.2.2.3.1. The letter of resignation submitted by an employee when the employee is not available to sign the Standard Form 52.
- E1.2.2.3.2. A statement of additional or conflicting reasons for an employee's resignation, if applicable.
- E1.2.2.3.3. For a separation to enter active Military Service, a copy of official military notification orders or induction notice.

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E2. ENCLOSURE 2

SAMPLE STANDARD FORM 52, "REQUEST FOR PERSONNEL ACTION"

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E3. ENCLOSURE 3

GLOSSARY OF TERMS For Use in Preparing a Request For Personnel Action

E3.1. Personnel Actions

Personnel actions include such actions as appointments, promotions, reassignments, change to lower grade, separations, leave without pay, details, change in work schedule, disciplinary and other actions defined below. These terms will be used to designate the "Personnel Action Requested" in Part I, Item C of the Standard Form 52. Other appropriate terminology may be used when the desired action is not included in the standard terms defined below:

E3.1.1. Appointments

- E3.1.1.1. Appointment or Recruit. Action to fill a vacant position.
- E3.1.1.2. <u>Reemployment</u>. The rehiring of a former employee whose separation provided reemployment rights such as overseas employment or Military Service.
- E3.1.1.3. <u>Restoration</u>. The return to duty of a separated person as a result of an appeal to proper authority or corrective action resulting from the finding that the separation was not warranted.
- E3.1.1.4. <u>Temporary Appointment</u>. A temporary appointment is for a specified period, not to exceed 1 year. Temporary appointments may be made to meet workload situations or short-term projects if a manpower space is available.

E3.1.2. Changes

- E3.1.2.1. <u>Position Change</u>. The movement by an employee, entitled to grade retention, to another position.
- E3.1.2.2. <u>Promotion</u>. The change of an employee to a higher grade or a higher rate of basic pay.
- E3.1.2.3. <u>Change to Lower Grade</u>. The change of an employee to a lower grade or a lower rate of basic pay.

- E3.1.2.4. <u>Reassignment</u>. The change of an employee from one position to another without promotion or change to lower grade.
- E3.1.2.5. <u>Detail</u>. A temporary assignment to a different position or set of duties for a specified period. At the end of the assignment the employee is expected to return to his or her regular duties.
- E3.1.2.6. Extension of (Type) Appointment. Extension of the Not to Exceed (NTE) date of a time-limited appointment, if permitted by the appointing authority.
- E3.1.2.7. <u>Leave Without Pay</u>. Temporary nonpay and nonduty status granted at the employee's request.
- E3.1.2.8. <u>Suspension</u>. The placement of an employee in a temporary nonpay and nonduty status for disciplinary reasons or other reasons pending an inquiry.
- E3.1.2.9. <u>Name Change</u>. A change required when the employee's name is marriage, divorce, or court action.
- E3.1.2.10. <u>Change in Work Schedule</u>. A change to or from a full-time, part-time, or intermittent schedule.
- E3.1.2.11. <u>Return to Duty</u>. The return of an employee to pay status after a furlough, suspension, leave without pay, or placement in nonpay status action.
- E3.1.2.11.1. <u>Realignment</u>. The movement of an employee and his or her position when the following are present:
- E3.1.2.11.1.1. An organizational change such as reorganization or transfer of function occurs,
 - E3.1.2.11.1.2. The employee stays in the same Agency.
- E3.1.2.11.1.3. There is no change in the employee's position, grade, or pay.
- E3.1.2.12. <u>PMRS Performance Award</u>. A monetary award granted under 5 U.S.C. 5406 (reference (f)), which provides for cash awards for job-related performance for PMRS employees.

E3.1.3. Separation

- E3.1.3.1. <u>Resignation</u>. Separation action initiated by an employee because of his or her desire to leave the organization.
- E3.1.3.2. <u>Termination</u>. Nondisciplinary separation action initiated by the Agency or employee such as expiration of temporary appointment or action when the employee (or a group of employees) moves from one Agency to another.
- E3.1.3.3. <u>Removal</u>. Disciplinary separation action initiated by the Agency, OPM, or she Merit System Protection Board (MSPB).
- E3.1.3.4. <u>Retirement</u>. An action that removes an employee from the rolls and places him or her on an immediate annuity, based solely on age and length of service, or disability.
 - E3.1.3.5. <u>Death</u>. A separation action because of the death of the employee.

E3.2. Position Actions

Position actions pertain to positions, not persons, and are concerned primarily with their establishment, cancellation, transfer, review, or change of sensitivity. The following terms will be used, as appropriate, to designate "Position Action Required" in Part I, Item F of the Standard Form 52.

- E3.2.1. <u>Establish</u>. A request to create a new position comprising duties and responsibilities differing from an existing position or to create an additional position identical in duties and responsibilities to an existing position.
- E3.2.2. <u>Abolish</u>. A request to discontinue an established position. This action occurs when the duties of a position no longer exist or when duties of a position are distributed among other employees.
- E3.2.3. <u>Cancel</u>. Generally used when an established position is replaced by a successor position.
- E3.2.4. <u>Transfer of Position</u>. The request to transfer a position from one organizational element to another without change in duties and responsibilities. The gaining organizational element shall initiate a separate Standard Form 52 for each position concerned.

- E3.2.5. <u>Review</u>. A request for an audit of an existing position to ensure the accuracy, proper classification, and evaluation.
- E3.2.6. <u>Designation or Change of Sensitivity</u>. A sensitive position is any position so designated within the Department of Defense, the occupant of which could bring about, by virtue of the nature of the position, a materially adverse effect on the national security. All civilian positions are either Critical-"sensitive, noncritical-sensitive, or nonsensitive as described in paragraph 3-101, DoD 5200.2-R (reference (e)).

E4. ENCLOSURE 4

SD FORM 225, "OFFICE OF THE SECRETARY OF DEFENSE PERSONNEL CHECKOUT SHEET"

FFICE OF THE PERSONN	SECRETARY EL CHECKOU		ISE							
DATA REQUIRED	BY THE PRIVA	CY ACT OF	1974							
1. AUTHORITY, 5 USC 3301, Examination, Certification, and A	Appaintment in C	ivil Service.								
PRINCIPAL PURPOSE, To be used by employees who are sep exit security briefing, and temporary retention by Civilian Person	parating for certifinel for 3 years af	cation of the er separation.	return of property	, absence of any indebtedness.						
ROUTINE USES, As stated in paragraph 2 above. (To be used by the Space Management and Services Directorate, Budget and Finance Directorate, and Personnel and Security Directorate for all separating employees of the Office of the Secretary of Dafense.)										
MANDATORY OR VOLUNTARY DISCLOSURE AND EFFE information is voluntary. However, if Civilian Personnel Office car	ECT ON INDIVIE nnot adequately i	IUAL NOT PE	ROVIDING INFOI dividual, pay due d	RMATION. Disclosure of could be held up.						
LAST NAME FIRST NAME MIDDLE INITIAL	SERIES A	O GRADE	RANK	SSAN						
ACTIVITY										
				DATE OF CHECKOUT						
REASONS FOR SEPARATION			NEW EMPLOYE	<u>l</u>						
				·· -						
PLEASE TAKE THIS CHECKLIST TO THE OFFICES LISTED BELOW INDEBTEDNESS, AND FOR EXIT SECURITY BRIEFING. AFTER CO SECURITY DIRECTORATE, ROOM 3B347, FOR FINAL ACTION.	FOR CERTIFIC MPLETION, AL	ATION OF THE	HE RETURN OF L WILL BRING I	PROPERTY, THE ABSENCE OF T TO THE PERSONNEL AND						
CHECKLIST	ROOM NO.	T	SIG	SNATURE						
I DUTY ACTIVITY CLEARANCE			311	314.1042						
a EXECUTIVE OFFICE		 								
5 TIMEKEEPER OR SUPERVISOR (Advanced Leave)	1	†								
II. SPACE MANAGEMENT AND SERVICE DIRECTORATE	3 C 345									
a. EMERGENCY RELOCATION CARDS		†								
b. CIVIL DEFENSE IDENTIFICATION CARDS		t								
c. PARKING PERMIT		T								
d NON EXPENDABLE PROPERTY		T								
e PUBLICATIONS AND BOOKS		1								
+ PERMANENT DOD BUS PASS (Civilian Personnel Only)		1								
III. BUDGET AND FINANCE DIRECTORATE	3 8 287	1								
a. MESS ACCOUNT										
b ADVANCED FUNDS - TRAVEL .	3 8 259									
c. BLANKET TRAVEL ORDERS				7,10						
d. GOVERNMENT TRANSPORTATION REQUESTS		1								
e. OFFICIAL PASSPORTS										
1 DISBURSING AGENTS										
IV. PERSONNEL AND SECURITY DIRECTORATE	3 B 347									
a SECURITY DIVISION (Exit Briefing)		L								
b. MILITARY PERSONNEL DIVISION										
(1) FIELD MILITARY 201 FILE AND ALLIED RECORDS (2) OFFICERS' REGISTER										
(3) ADEQUATE QUARTERS WERE FURNISHED WERE NO	T									
TO	_									
c. CIVILIAN PERSONNEL ONLY										
(1) TRAINING AGREEMENTS (Trag & Career Dev Div) (2) EXIT INTERVIEW (Staffing & Spt Prog Div)		 								
The state of the s		 -								
F 278 RECEIVED (Indicate receipt by employee's signature)		DOD DIREC	TIVE 7700.15 Re	ECEIVED (Indicate receipt by						
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SD FORM 225

ALL PREVIOUS EDITIONS ARE OBSOLETE